

Serial No. 09/735,444

Joseph Samuel Brattain

Page 2 of 10

Section I:
AMENDMENT UNDER 37 CFR §1.121 to the
CLAIMS

Claim 1 (currently amended):

A method for organizing briefing packages for presentation to a sales account executive regarding client business entities managed by said sales account executive, said method comprising the steps of:

storing a plurality of client records relating to one or more client business entities, each client record containing a plurality of fields in at least one client account database, at least one of said fields containing a link to data, documents or information external to said database;

parsing a portion of an electronic mail message according to a predetermined format to determine a client record to which the message is to be linked;

integrating information to form a briefing package by linking said electronic mail message and at least one other external data item to at least one client record, said other external data item being selected from the list of a stock share price quote server, a business plan document, a marketing strategy document, a note from a previous meeting with said client, a previously presented presentation document and an action item list;

subsequently showing a first set of information for a selected client account on a main screen view on a user display by selecting an a client record associated with a specific client business entity; and

providing in said first set of shown information one or more user-selectable expandable subforms, wherein at least one subform retrieves and shows at least one of said linked external data items when expanded.

Claim 2 (previously amended):

The method as set forth in Claim 1 wherein said step of parsing a portion of said electronic mail message according to a predetermined format comprises parsing a subject field for a client name indicator.

Serial No. 09/735,444Joseph Samuel BrattainPage 3 of 10

Claim 3 (previously amended):

The method as set forth in Claim 1 wherein said step of showing a first set of information comprises showing a stock share trading symbol for a selected client account.

Claim 4 (previously canceled).

Claim 5 (previously amended):

The method as set forth in Claim 1 wherein said step of providing comprises providing at least one hyperlink to a word processor document.

Claim 6 (previously canceled).

Claim 7 (previously amended):

The method as set forth in Claim 1 wherein said step of providing comprises providing at least one hyperlink to a computer-readable presentation file.

Claim 8 (previously amended):

The method as set forth in Claim 1 wherein said step of providing comprises providing at least one hyperlink to an action item list.

Claim 9 (previously amended):

The method as set forth in Claim 1 wherein said step of providing comprises providing at least one hyperlink to a biographical account of an employee for a selected client account.

Serial No. 09/735,444

Joseph Samuel Brattain

Page 4 of 10

Claim 10 (previously amended):

A computer program embodied in a computer-readable medium for organizing and briefing packages for presentation to sales account executives, said computer program performing steps comprising:

storing a plurality of client records relating to one or more client business entities, each client record containing a plurality of fields in at least one client account database, at least one of said fields containing a link to data, documents or information external to said database;

parsing a portion of an electronic mail message according to a predetermined format to determine a client record to which the message is to be linked;

integrating information to form a briefing package by linking said electronic mail message and at least one other external data item to at least one client record, said other external data item being selected from the list of a stock share price quote server, a business plan document, a marketing strategy document, a note from a previous meeting with said client, a previously presented presentation document and an action item list;

subsequently showing a first set of information for a selected client account on a main screen view on a user display by selecting an client record associated with a specific client business entity; and

providing in said first set of shown information one or more user-selectable expandable subforms, wherein at least one subform retrieves and shows at least one of said linked external data items when expanded.

Claim 11 (previously amended):

The computer program as set forth in Claim 10 wherein said program for retrieving linked external data items comprises program for showing word processor files.

Claim 12 (previously amended):

The computer program as set forth in Claim 10 wherein said program for retrieving linked external data items comprises program for showing computer-readable presentation files.

Serial No. 09/735,444Joseph Samuel BrattainPage 5 of 10

Claim 13 (previously amended):

The computer program as set forth in Claim 10 wherein said program code for parsing a portion of said electronic mail message comprises parsing a subject field for a client name indicator.

Claim 14 (previously canceled).

Claim 15 (previously amended):

The computer program as set forth in Claim 10 wherein said program for retrieving linked external data items comprises program for showing a stock share quote for a selected client company.

Claim 16 (canceled).

Serial No. 09/735,444

Joseph Samuel Brattain

Page 6 of 10

Claim 17 (previously amended):

A system for organizing information and presenting executive briefing packages comprising:

- a storage device for storing a plurality of client records, said client records each containing data or links to data relating to a different customer and each record containing a plurality of fields, at least one of said fields containing a link to data, documents or information external to said database;

- an email parser configured to parse a portion of an electronic mail message according to a predetermined format to determine a client record to which the message is to be linked;

- a first program code means integrating and showing a first set of information for a selected client account on a main screen view on a user display, said integrating information forming a briefing package by linking said electronic mail message and at least one other external data item to at least one client record, said other external data item being selected from the list of a stock share price quote server, a business plan document, a marketing strategy document, a note from a previous meeting with said client, a previously presented presentation document and an action item list; and

- a second code means for providing user-selectable expandable subforms and hyperlinks to additional information for said selected client account, wherein at least one subform retrieves and shows at least one of said linked external data items when expanded.

Claim 18 (original):

The system as set forth in Claim 17 wherein said second code means comprises code means for causing the computer to show word processor files.

Serial No. 09/735,444Joseph Samuel BrattainPage 7 of 10

Claim 19 (original):

The system as set forth in Claim 17 wherein said second code means comprises code means for causing the computer to show computer-readable presentation files.

Claim 20 (previously amended):

The system as set forth in Claim 17 wherein said email parser is further configured to parse a subject field of said electronic message for a client name indicator.

Claim 21 (original):

The system as set forth in Claim 17 wherein said second code means comprises code means for causing the computer to show biographical information concerning at least one employee of a selected client company.

Claim 22 (original):

The system as set forth in Claim 17 further comprising a remote access communications interface for providing access to said database via a computer network, and for showing said first set of information for a selected client account on a remote computer display.

Claim 23 (canceled).